

ONBASE TRAINING

What is OnBase : Create, Manage and Retrieve

- Document management system
- Store documents securely and electronically in a central location
- User friendly interface that allows easy retrieval of documents
- Documents can be viewed, printed, emailed, and have notes added to them
- Workflow module for departments that want to use OnBase to process documents

Login

OnBase[®]13
a Hyland Software solution

Domain

User Name

Password

Login

Depending on modules licensed, this product may contain portions of:
Imaging technology © Snowbound Software, Inc.
Full Text Indexing technology © Autonomy.

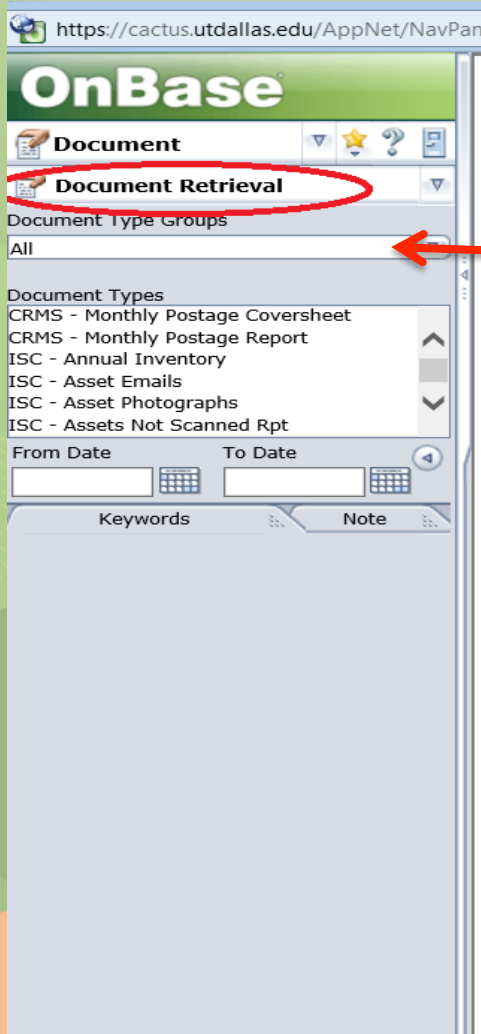
Version 13.0.2.165 - Copyright © 1992 - 2014 Hyland Software, Inc.

Document Retrieval Dialog Window Layout

- Document Type Groups
- Document Types
- Dates
- Keyword



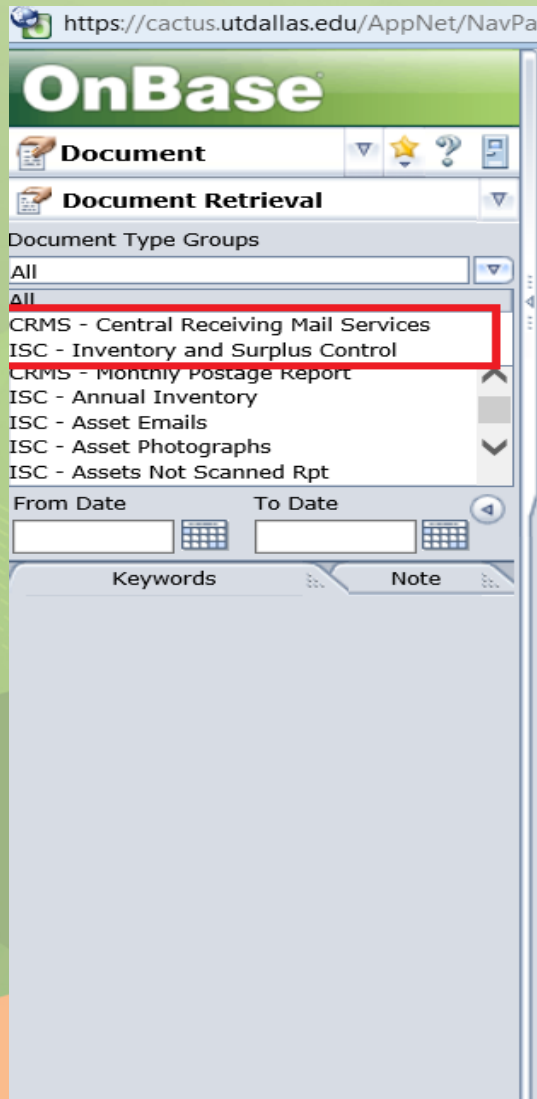
OnBase Document Retrieval



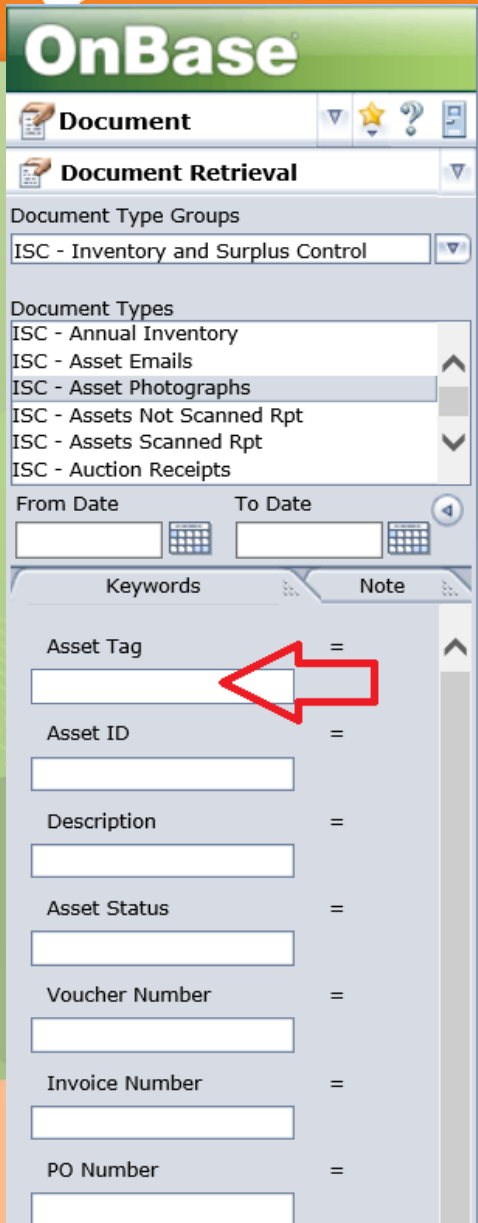
The screenshot shows the OnBase web application interface. The browser address bar displays <https://cactus.utdallas.edu/AppNet/NavPanel.aspx>. The OnBase logo is at the top left of the application area. Below it, a navigation bar contains a 'Document' tab and a 'Document Retrieval' tab, which is circled in red. Under the 'Document Retrieval' tab, there is a 'Document Type Groups' section with a dropdown menu currently set to 'All'. A red arrow points from the 'Document Type Groups' dropdown to the first bullet point of the list on the right. Below the dropdown is a list of 'Document Types' including 'CRMS - Monthly Postage Coversheet', 'CRMS - Monthly Postage Report', 'ISC - Annual Inventory', 'ISC - Asset Emails', 'ISC - Asset Photographs', and 'ISC - Assets Not Scanned Rpt'. At the bottom of the interface, there are fields for 'From Date' and 'To Date', and tabs for 'Keywords' and 'Note'.

1. Document Type Groups:

- Document type groups are groups defined by our organization
- A group is a general heading for specific types of documents
- Ex. Inventory and Surplus control



- There are two document type groups:
 - Central Receiving Mail Services (CRMS)
 - Inventory and Surplus Control (ISC)



OnBase

Document

Document Retrieval

Document Type Groups
ISC - Inventory and Surplus Control

Document Types
ISC - Annual Inventory
ISC - Asset Emails
ISC - Asset Photographs
ISC - Assets Not Scanned Rpt
ISC - Assets Scanned Rpt
ISC - Auction Receipts

From Date To Date

Keywords Note

Asset Tag =

Asset ID =

Description =

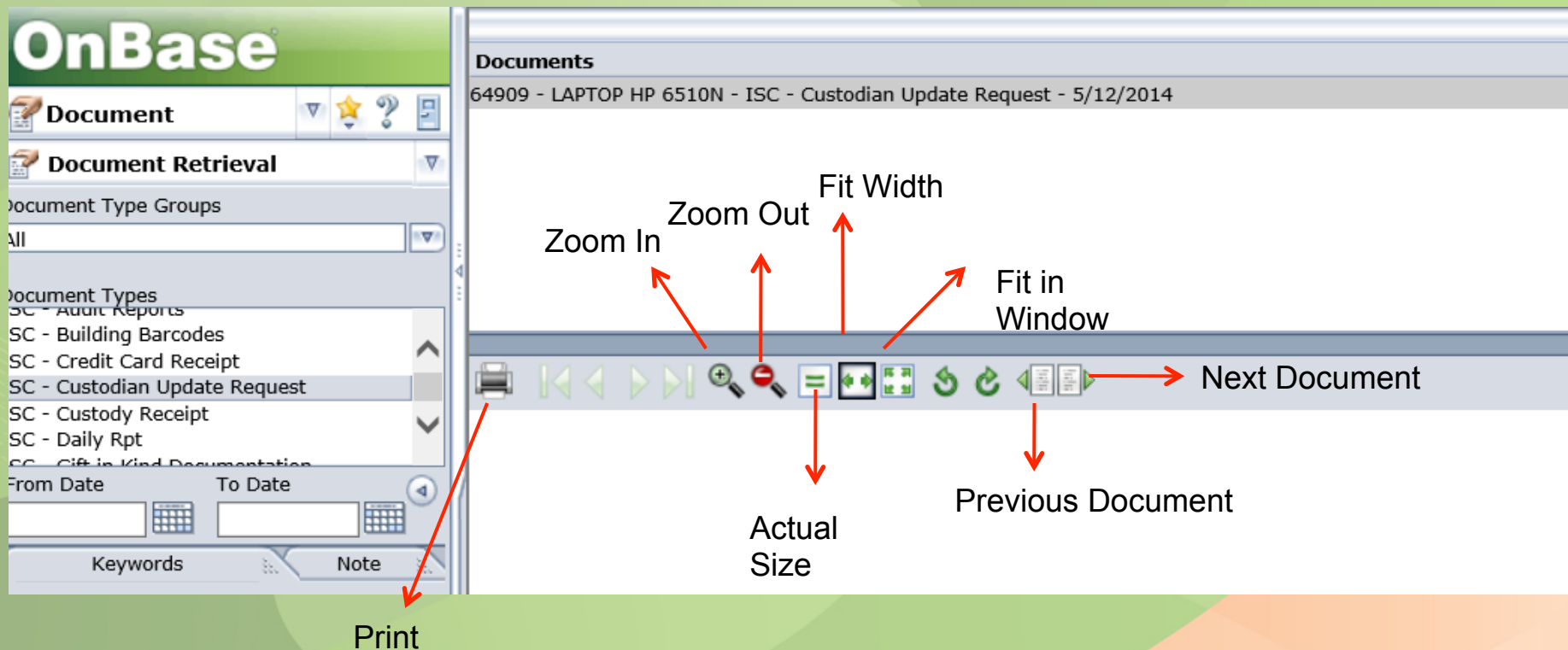
Asset Status =

Voucher Number =

Invoice Number =

PO Number =

- Anything that has a **tag number**, you can find it on OnBase.
- Assets can be looked in the following categories ;
 - asset emails
 - photographs
 - credit card receipts
 - custodian update request
 - custody receipts
 - gift in kind documentation
 - MISC (miscellaneous)
 - missing stolen report
 - property master record
 - state transfer
 - transfer forms
 - vehicle titles



Custodian Update Receipt

OnBase

Document

Document Retrieval

Document Type Groups

ISC - Inventory and Surplus Control

Document Types

ISC - Audit Reports

ISC - Building Barcodes

ISC - Custodian Update Request

ISC - Custody Receipt

ISC - Daily Rot

From Date

To Date

Keywords

Note

Asset Tag

64909

Asset ID

Description

Asset Status

Location

Areal ID

Custodian

Documents

64909 - LAPTOP HP 6510N - ISC - Custodian Update Request - 5/12/2014

White, Gregory

From:

Boulom, Alisa

Sent:

Monday, May 12, 2014 11:08 AM

To:

White, Gregory

Cc:

Ritchey, David; Sanzgiri, David; Calisir, Engin

Subject:

RE: Laptops Tag #'s 64909 and 73275

Hello Greg,

Professor George Barnes was incorrectly marked as inactive and is an active adjunct instructor. He just verified with me that he still uses 64909 HP 6510N laptop and it is in his possession .

Mark McNabb is no longer employed at UTD and 73275 MacBook Air laptop is now used as a JSOM "check out laptop". New custodian is me, Alisa Boulom 2010167825.

Thank you,

Alisa Boulom
Administrative Assistant
JSOM Technology Services
972-883-4484
aboulom@utdallas.edu

From:

Thorp, Craig

Sent:

Monday, May 12, 2014 10:00 AM

To:

Boulom, Alisa

Cc:

Ritchey, David; White, Gregory; Garner, Carla

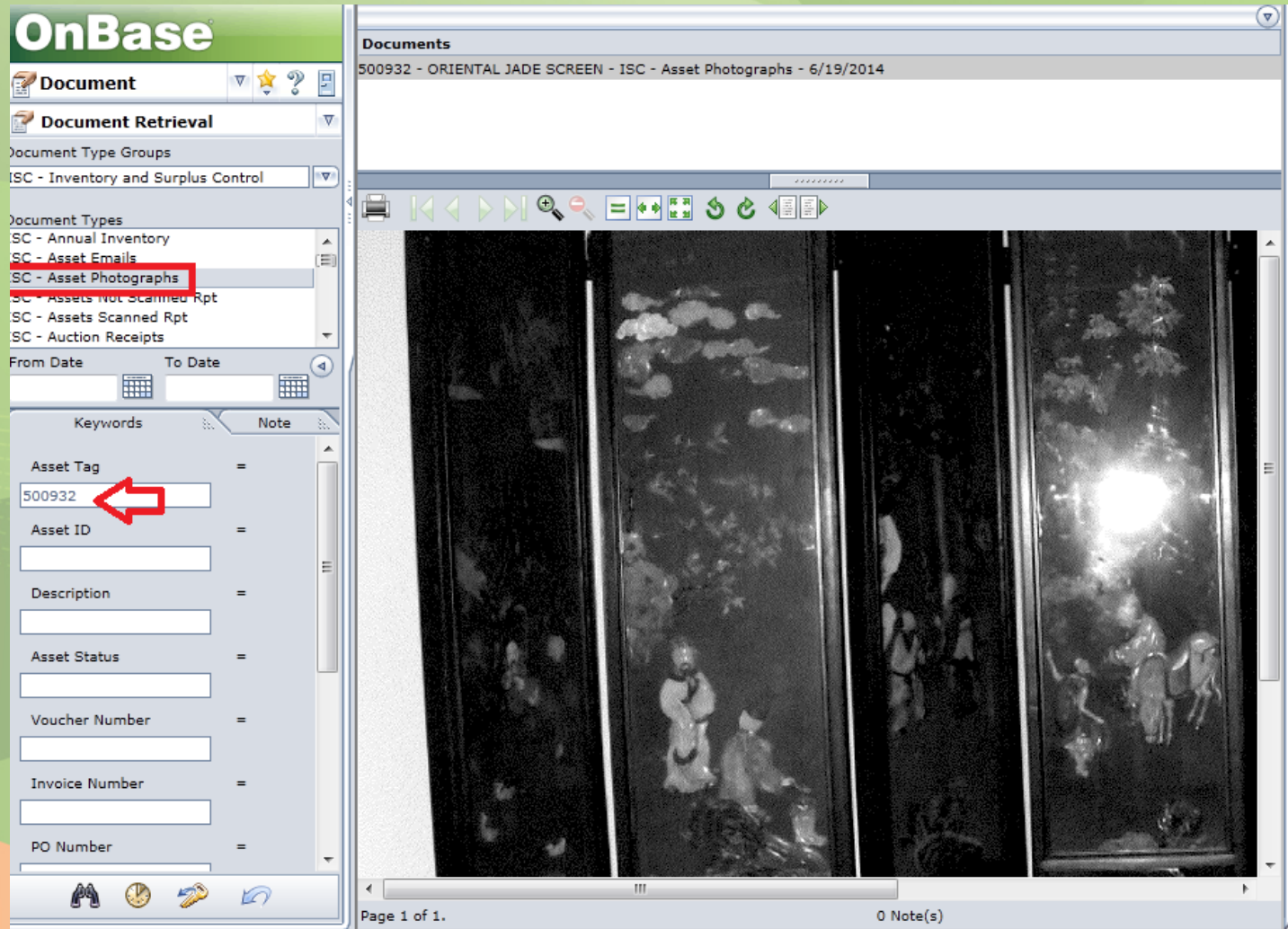
Subject:

Laptops Tag #'s 64909 and 73275

Page 1 of 1.

0 Note(s)

Asset Photographs



Credit Card Receipt

OnBase

Document

Document Retrieval

Document Type Groups

ISC - Inventory and Surplus Control

Document Types

ISC - Audit Reports

ISC - Building Barcodes

ISC - Credit Card Receipt

ISC - Custodian Update Request

ISC - Custody Receipt

ISC - Daily Rot

From Date

To Date

Keywords

Note

Asset Tag

75733

Asset ID

Description

Asset Status

Voucher Number

Invoice Number

PO Number

Documents

75733 - TABLET IPAD 16GB - ISC - Credit Card Receipt - 7/25/2013

09/05/2012 10:56:28

HiEd

HiEd Inc., dba UTD Technology Store

800 W Campbell, VCB Visitor Center

Richardson, TX 75080

(972) 883-6500

Invoice # S8089219 09/05/2012 10:55:55

ADM/ADM Cust# UTDALLO1

PIERRETTE LACOUR

UNIVERSITY OF TEXAS @ DALLAS, THE

MD386LLA APPLE IPAD WI-FI + 4G ATT 16

Ser# DYVHV5CUDVGG

1 @ 629.00

629.00 +

SUBTOTAL 629.00 =

TX 0.00% Sales Tax 0.00 +

TOTAL 629.00 =

Payment

Credit XXXX9498 MCV 629.00 -

Ticket# S80892190

Auth# 048510

Change Due 0.00 -

Page 1 of 1.

0 Note(s)

Gift in Kind Documentation

OnBase

Document

Document Retrieval

Document Type Groups

ISC - Inventory and Surplus Control

Document Types

- ISC - Custodian Update Request
- ISC - Custody Receipt
- ISC - Daily Ret
- ISC - Gift in Kind Documentation**
- ISC - Global Assets
- ISC - Inventory Validation
- ISC - MISC

From Date To Date

Keywords Note

Asset Tag

501317

Asset ID

Description

Asset Status

Voucher Number

Invoice Number

PO Number

Documents

501317 - 58 BOOKS MICHAEL SAVOIE - ISC - Gift in Kind Documentation - 6/19/2014

501317 18HB 45B 4CD, 2DVD

DATE 9/3/2012

TK

Print Form

In-Kind Gift Acceptance Form
Office of Development & Alumni Relations
The University of Texas at Dallas

Date: May 14, 2012

School/Unit: SDM - Mc Dermott Library

Department: SDM - Mc Dermott Library

Form completed by: Michael Savoie

Phone: x4755 Email: msavoie@utdallas.edu

Is this gift benefiting more than one school or unit? No

If yes, please list units and their contact persons:

Donor's Name: Michael Savoie

Address, City, State, Zip: PO BOX 1180, Justin TX 76247-1180

Type of In-Kind Gift:

☐ Art or Collectibles ☐ Equipment

☐ Intellectual Property/Patent ☐ Software

☐ Discount on Purchase (must be in excess of the standard "education discount")

☒ Other

Description of Gift: Books (58) 75 / CAT 92

Benefit to University: enhance student access to classic and current works

Value of Gift: \$500.00 (87001)

Source of Valuation: ☐ Internal ☒ Donor ☐ Appraiser

Condition of Gift: ☐ New ☒ Good ☐ Poor ☐ Unknown ☐ N/A

Special Storage Requirements: ☐ Yes ☒ No

Page 1 of 1. 0 Note(s)

Packing Slips

OnBase

Document

Document Retrieval

Document Type Groups

ISC - Inventory and Surplus Control

Document Types

- ISC - Mobile Asset Validation List
- ISC - Packing Slips**
- ISC - Property Master Record
- ISC - Property Procedures
- ISC - State Transfer
- ISC - Transfer Forms

From Date To Date

Keywords Note

PO Number =

Voucher Number =

Invoice Number =

Asset Tag =

79000

Description =


Location =

Areal ID =

Documents

S048325 - ISC - Packing Slips - 2/12/2014

Packing List



Agilent Technologies

Customer Purchase Order Number S048325/1038583		
Agilent Sales Order Number 3316194	Ship Date 14-Jan-2014	
Freight Terms Prepaid	Incoterms DDP	
Ship Method FED EX-GROUND	Carrier Reference Number	Trip Number 8073804

Bill To:
Electro Rent Corp
6060 Sepulveda Blvd
VAN NUYS CA 91411-2501
United States

Attention: PD# S048325/Attn: Wooyeol Choi

Ship To:
University of Texas at Dallas
2811 N Floyd Rd
RICHARDSON TX 75080
United States

Telephone: 214-202-7805

Ech 3.802

Please Direct Inquiries To: Electro Rent Customer Care Center Telephone: 1-800-455-5445 Email: csc@electrorent.com		Agilent Sales Office: Agilent Technologies Inc. / US PO BOX 4026 ENGLEWOOD Colorado 80155-4026 United States
--	--	---

For detailed information on the accessories shipped, please refer to the Box Content List located in each individual box.

Buyer Contact: Bruce Spector & Michael Greene
Buyer Tel #: 818-374-6234 (818) 374-6225
Buyer Email: bspector@electrorent.com & mgr Greene@electrorent.com

Item	Product Number/Description	Total Quantity Shipped	Delivery Number	Serial Number	Country of Origin	Box Number

Page 1 of 2. 0 Note(s)

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a Hyland Software solution

Domain

User Name

Password

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Depending on modules licensed, this product may contain portions of:
Imaging technology © Snowbound Software, Inc.
Full Text Indexing technology © Autonomy.

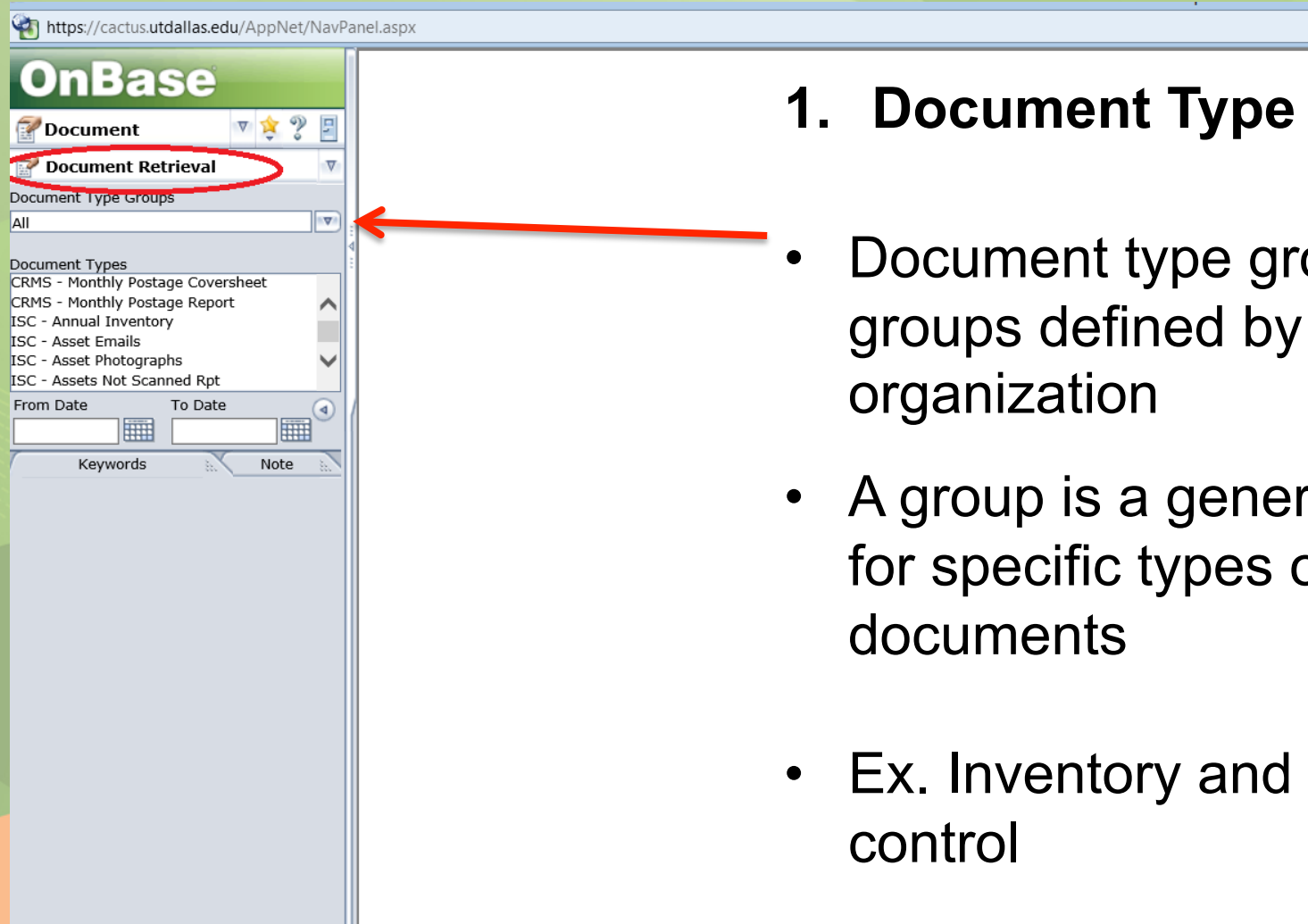
Version 13.0.2.165 - Copyright © 1992 - 2014 Hyland Software, Inc.

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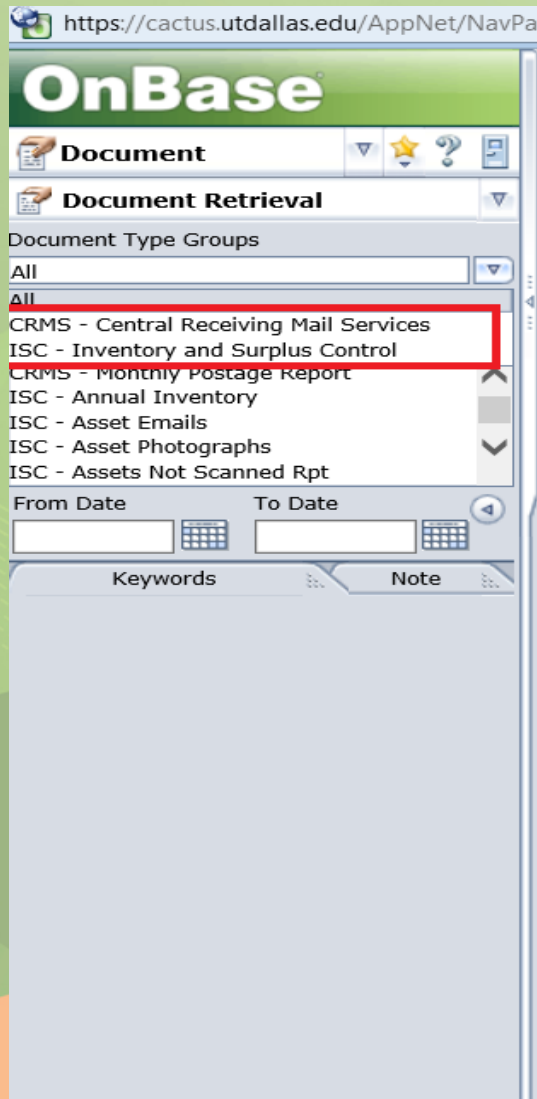


OnBase Document Retrieval

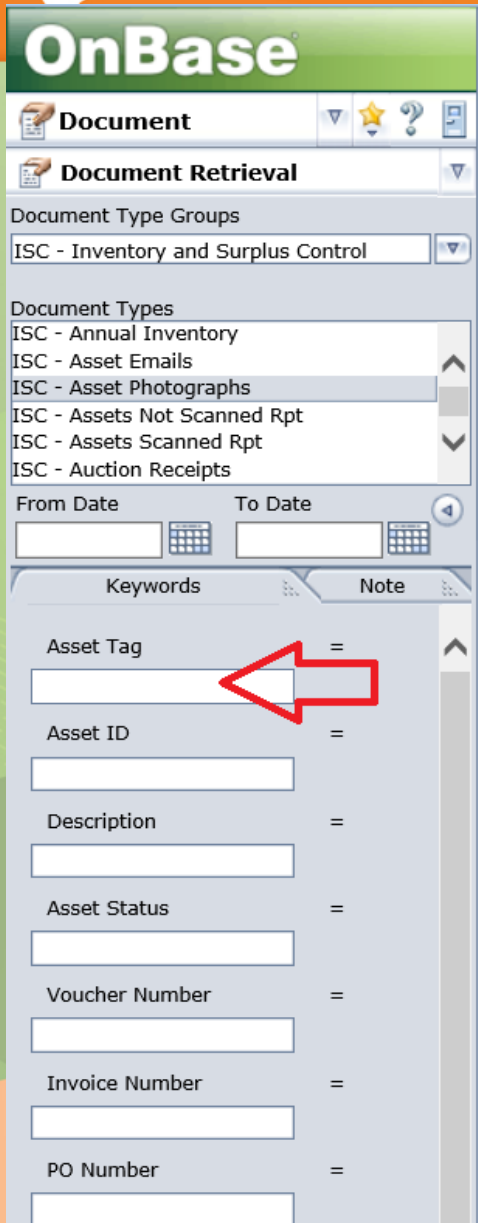


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ISC - Assets Not Scanned Rpt
ISC - Assets Scanned Rpt
ISC - Auction Receipts

From Date To Date

Keywords Note

Asset Tag =

Asset ID =

Description =

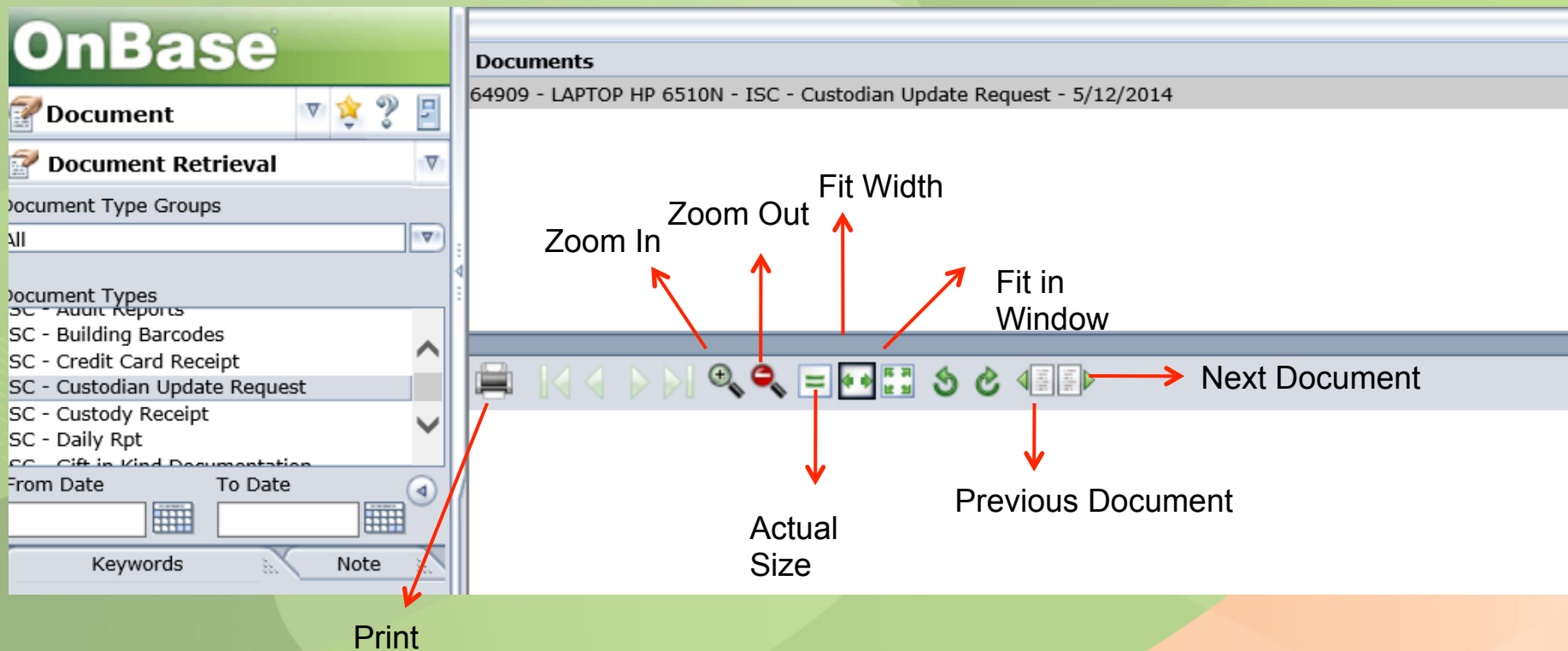
Asset Status =

Voucher Number =

Invoice Number =

PO Number =

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 - custodian update request
 - custody receipts
 - gift in kind documentation
 - MISC (miscellaneous)
 - missing stolen report
 - property master record
 - state transfer
 - transfer forms
 - vehicle titles

A screenshot of the OnBase software interface. The left sidebar contains a "Document" section with a "Document Retrieval" dropdown, a "Document Type Groups" list with "All" selected, and a "Document Types" list including "SC - Audit Reports", "SC - Building Barcodes", "SC - Credit Card Receipt", "SC - Custodian Update Request", "SC - Custody Receipt", "SC - Daily Rpt", and "SC - Gift in Kind Documentation". Below these are "From Date" and "To Date" fields with calendar icons, and "Keywords" and "Note" fields. The main window displays a document titled "64909 - LAPTOP HP 6510N - ISC - Custodian Update Request - 5/12/2014". A toolbar at the bottom of the main window contains various icons. Red arrows point from text labels to specific icons: "Print" points to the printer icon; "Zoom In" points to the magnifying glass with a plus sign; "Zoom Out" points to the magnifying glass with a minus sign; "Actual Size" points to the icon with horizontal lines; "Fit Width" points to the icon with a double-headed arrow and a square; "Fit in Window" points to the icon with a double-headed arrow and a rectangle; "Previous Document" points to the left arrow icon; and "Next Document" points to the right arrow icon.

Custodian Update Receipt

OnBase

Document

Document Retrieval

Document Type Groups

ISC - Inventory and Surplus Control

Document Types

ISC - Audit Reports

ISC - Building Barcodes

ISC - Custodian Update Request

ISC - Custody Receipt

ISC - Daily Rot

From Date

To Date

Keywords

Note

Asset Tag

64909

Asset ID

Description

Asset Status

Location

Areal ID

Custodian

Documents

64909 - LAPTOP HP 6510N - ISC - Custodian Update Request - 5/12/2014

White, Gregory

From:

Boulom, Alisa

Sent:

Monday, May 12, 2014 11:08 AM

To:

White, Gregory

Cc:

Ritchey, David; Sanzgiri, David; Calisir, Engin

Subject:

RE: Laptops Tag #'s 64909 and 73275

Hello Greg,

Professor George Barnes was incorrectly marked as inactive and is an active adjunct instructor. He just verified with me that he still uses 64909 HP 6510N laptop and it is in his possession .

Mark McNabb is no longer employed at UTD and 73275 MacBook Air laptop is now used as a JSOM "check out laptop". New custodian is me, Alisa Boulom 2010167825.

Thank you,

Alisa Boulom
Administrative Assistant
JSOM Technology Services
972-883-4484
aboulom@utdallas.edu

From:

Thorp, Craig

Sent:

Monday, May 12, 2014 10:00 AM

To:

Boulom, Alisa

Cc:

Ritchey, David; White, Gregory; Garner, Carla

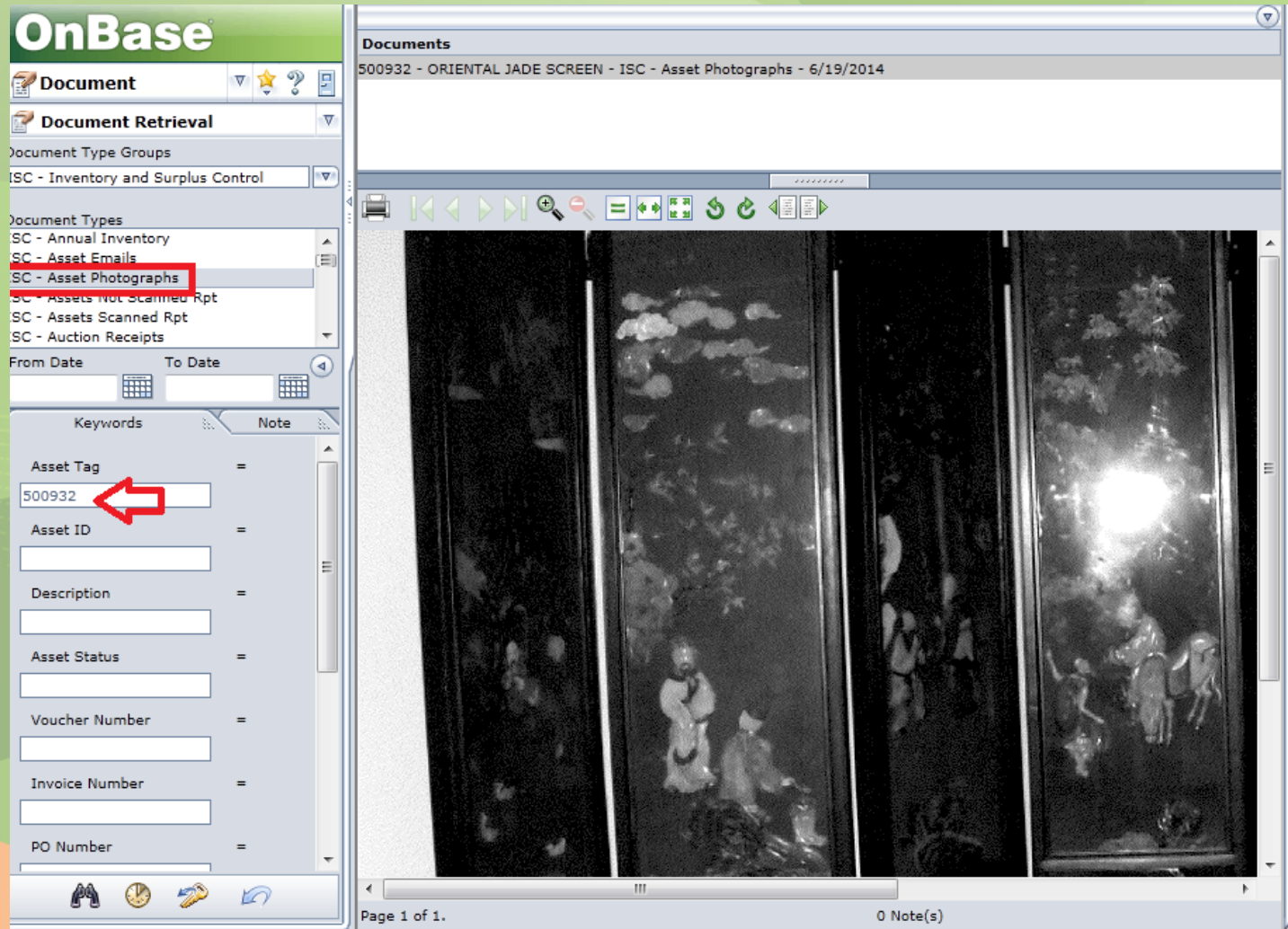
Subject:

Laptops Tag #'s 64909 and 73275

Page 1 of 1.

0 Note(s)

Asset Photographs



Credit Card Receipt

OnBase

Document

Document Retrieval

Document Type Groups

ISC - Inventory and Surplus Control

Document Types

ISC - Audit Reports

ISC - Building Barcodes

ISC - Credit Card Receipt

ISC - Custodian Update Request

ISC - Custody Receipt

ISC - Daily Rot

From Date

To Date

Keywords

Note

Asset Tag

75733

Asset ID

Description

Asset Status

Voucher Number

Invoice Number

PO Number

Documents

75733 - TABLET IPAD 16GB - ISC - Credit Card Receipt - 7/25/2013

09/05/2012 10:56:28

HiEd

HiEd Inc., dba UTD Technology Store

800 W Campbell, VCB Visitor Center

Richardson, TX 75080

(972) 883-6500

Invoice # S8089219 09/05/2012 10:55:55

ADM/ADM Cust# UTDALLO1

PIERRETTE LACOUR

UNIVERSITY OF TEXAS @ DALLAS, THE

MD386LLA APPLE IPAD WI-FI + 4G ATT 16

Ser# DYVHV5CUDVGG

1 @ 629.00

629.00 +

SUBTOTAL 629.00 =

TX 0.00% Sales Tax 0.00 +

TOTAL 629.00 =

Payment

Credit XXXX9498 MCV 629.00 -

Ticket# S80892190

Auth# 048510

Change Due 0.00 -

Page 1 of 1.

0 Note(s)

Gift in Kind Documentation

OnBase

Document

Document Retrieval

Document Type Groups

ISC - Inventory and Surplus Control

Document Types

ISC - Custodian Update Request

ISC - Custody Receipt

ISC - Daily Report

ISC - Gift in Kind Documentation

ISC - Global Assets

ISC - Inventory Validation

ISC - MISC

From Date

To Date

Keywords

Note

Asset Tag

501317

Asset ID

Description

Asset Status

Voucher Number

Invoice Number

PO Number

Documents

501317 - 58 BOOKS MICHAEL SAVOIE - ISC - Gift in Kind Documentation - 6/19/2014

501317 18HB 45B 4CD, 2DVD

DATE 9/3/2012

In-Kind Gift Acceptance Form

Office of Development & Alumni Relations

The University of Texas at Dallas

Date: May 14, 2012

School/Unit: SDM - Mc Dermott Library

Department: SDM - Mc Dermott Library

Form completed by: Michael Savoie

Phone: x4755 Email: msavoie@utdallas.edu

Is this gift benefiting more than one school or unit? No

If yes, please list units and their contact persons:

Donor's Name: Michael Savoie

Address, City, State, Zip: PO BOX 1180, Justin TX 76247-1180

Type of In-Kind Gift:

☐ Art or Collectibles ☐ Equipment

☐ Intellectual Property/Patent ☐ Software

☐ Discount on Purchase (must be in excess of the standard "education discount")

☒ Other

Description of Gift: Books (58) 75 / CAT 92

Benefit to University: enhance student access to classic and current works

Value of Gift: \$500.00 (87001)

Source of Valuation: ☐ Internal ☒ Donor ☐ Appraiser

Condition of Gift: ☐ New ☒ Good ☐ Poor ☐ Unknown ☐ N/A

Special Storage Requirements: ☐ Yes ☒ No

Packing Slips

OnBase

Document

Document Retrieval

Document Type Groups

ISC - Inventory and Surplus Control

Document Types

- ISC - Mobile Asset Validation List
- ISC - Packing Slips**
- ISC - Property Master Record
- ISC - Property Procedures
- ISC - State Transfer
- ISC - Transfer Forms

From Date To Date

Keywords Note

PO Number =

Voucher Number =

Invoice Number =

Asset Tag =

79000

Description =


Location =

Areal ID =

Documents

S048325 - ISC - Packing Slips - 2/12/2014

Packing List



Agilent Technologies

Customer Purchase Order Number
S048325/1038583

Agilent Sales Order Number
3316194

Freight Terms
Prepaid

Ship Method
FED EX-GROUND

Ship Date
14-Jan-2014

Incoterms
DDP

Carrier Reference Number
214-202-7805

Trip Number
8073804

Bill To:
Electro Rent Corp
6060 Sepulveda Blvd
VAN NUYS CA 91411-2501
United States

Attention: PD# S048325/Attn: Wooyeol Choi

Ship To:
University of Texas at Dallas
2811 N Floyd Rd
RICHARDSON TX 75080
United States

Telephone: 214-202-7805

Ech 3.802

Please Direct Inquiries To:
Electro Rent Customer Care Center
Telephone: 1-800-455-5445
Email: csc@electrorent.com

Agilent Sales Office:
Agilent Technologies Inc. / US
PO BOX 4026
ENGLEWOOD Colorado 80155-4026
United States

For detailed information on the accessories shipped, please refer to the Box Content List located in each individual box.

Buyer Contact: Bruce Spector & Michael Greene
Buyer Tel #: 818-374-6234 (818) 374-6225
Buyer Email: bspector@electrorent.com & mgr Greene@electrorent.com

Item	Product Number/Description	Total Quantity Shipped	Delivery Number	Serial Number	Country of Origin	Box Number